

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

Source of Funds	FY01 Adjusted Base	FY02 Recommended	% Change Over FY01	FY03 Recommended	% Change Over FY02
GPR	12,167,000	11,827,600	-2.8	11,684,100	-1.2
PR-F	1,038,400	1,045,800	0.7	1,044,500	-0.1
PR-O	4,580,700	3,838,800	-16.2	3,874,600	0.9
PR-S	1,696,400	1,708,400	0.7	1,708,400	0.0
SEG-O	519,900	525,700	1.1	525,700	0.0
TOTAL	20,002,400	18,946,300	-5.3	18,837,300	-0.6

FULL-TIME EQUIVALENT POSITION SUMMARY

Source of Funds	FY01 Adjusted Base	FY02 Recommended	FTE Change From FY01	FY03 Recommended	FTE Change From FY02
GPR	139.50	139.50	0.00	139.50	0.00
PR-F	5.85	6.60	0.75	6.10	-0.50
PR-O	18.80	11.97	-6.83	9.47	-2.50
PR-S	14.00	13.25	-0.75	13.25	0.00
SEG-O	3.25	3.75	0.50	3.75	0.00
TOTAL	181.40	175.07	-6.33	172.07	-3.00

AGENCY DESCRIPTION

The society is governed by a board of curators consisting of 24 individuals elected by the society's members; the Governor or his or her designee; a member of the majority and minority parties from the Senate and Assembly; three members nominated by the Governor with the advice and consent of the Senate; and four additional ex-officio curators designated by the society's constitution. The board of curators appoints the director who serves as secretary of the board and the administrative head of the society.

The society fulfills its mission through the following major program operations:

1. Maintenance of a research library of materials related to the history of Wisconsin and North America, which includes more than 3.7 million items;
2. Maintenance of the archives of the State of Wisconsin and its local governments and the collection of unpublished historical records on all aspects of the history of Wisconsin and of materials in national collection areas such as the history of organized labor, social action and reform, and the mass communications media in the United States;
3. Collection and exhibition of artifacts and cultural objects relevant to the history of Wisconsin by operation of the State Historical Museum and eight historic sites. A ninth site owned by the society, Circus World Museum, is operated by a nonprofit foundation under a management agreement;
4. Identification, registration, protection and restoration of historic structures and archaeological sites;

5. Research and publication of books, periodicals, pamphlets and other materials relating to Wisconsin and United States history; and
6. Extension of technical assistance to over 300 affiliated historical societies; genealogical and scholarly researchers; other state, local and private agencies; and the general public in any matters relating to the collection, preservation and dissemination of history. The society is organized along functional lines with six operating divisions: Library and Archives, Historic Sites, Historic Preservation, Administrative Services, Public History and Museum.

MISSION

The agency's mission is to collect, preserve and interpret historical and cultural resources relating to the history of Wisconsin, the United States and Canada. The society is an institution dedicated to scholarly research and public education about the American past.

PROGRAMS, GOALS, OBJECTIVES AND ACTIVITIES

Program 1: Archives, Research and Library Services

Goal: Increase public access to primary resources and the public record on the history of Wisconsin and North America.

Objective/Activity: Increase the percentage of all collections that are cataloged in on-line catalogs.

Program 2: Historic Sites

Goal: Increase the general public knowledge and appreciation of the history of Wisconsin.

Objective/Activity: Increase public participation in the historic sites programming.

Goal: Enhance and improve statewide education curriculum efforts to increase student knowledge of history.

Objective/Activity: Increase student participation and interaction with the society program offerings.

Program 3: Historic and Burial Sites Preservation

Goal: Encourage the rehabilitation and reuse of historic structures throughout the state.

Objective/Activity: Increase the number of buildings rehabilitated using the state and federal historic building rehab tax credit programs.

Program 4: Executive and Administrative Services

Goal: Provide increased access to society services and resources.

Objective/Activity: Increase the level of access to society services and resources by increasing the amount of information, resources and applications available on the society's Web site.

Program 5: Museum

Goal: Increase the general public knowledge and appreciation of the history of Wisconsin.

Objective/Activity: Increase public participation in the museum programming.

Goal: Enhance and improve statewide education curriculum efforts to increase student knowledge of history.

Objective/Activity: Increase student participation and interaction with the society program offerings.

PERFORMANCE MEASURE

Prog No.	Performance Measure	Actual 2000	Goal 2001	Goal 2002	Goal 2003
1.	Percent of all collections catalogued on-line.	31.4%	32.8%	33.6%	34.2%
2.	Total historic sites attendance.	182,857	184,686	188,379	192,147
2.	Attendance of school-age children at historic sites.	43,344	43,777	44,653	45,546
3.	Number of buildings receiving tax credits.	185	200	225	250
4.	Number of unique visits to the society Web site.	543,130	1,000,000	1,300,000	1,500,000
5.	Total museum attendance.	77,664	80,000	82,500	85,000
5.	Attendance of school-age children at the museum.	26,009	26,800	27,600	28,500

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

RECOMMENDATIONS

1. Historical Society Appropriation Consolidation
2. Transfer Position
3. PR-O, PR-F, SEG Adjustments
4. Fuel and Utility Reestimate
5. Debt Service Reestimate
6. Budget Efficiency Measures
7. Standard Budget Adjustments

ITEMS NOT APPROVED

8. Excellence in History Education in Wisconsin Schools
9. Executive Assistant

**Table 1
Department Budget Summary by Funding Source (in thousands of dollars)**

	ACTUAL FY00	ADJUSTED BASE FY01	AGENCY REQUEST FY02 FY03		GOVERNOR'S RECOMMENDATION FY02 FY03	
GENERAL PURPOSE REVENUE	\$11,649.5	\$12,167.0	\$12,301.4	\$12,406.6	\$11,827.6	\$11,684.1
State Operations	11,649.5	12,167.0	12,301.4	12,406.6	11,827.6	11,684.1
FEDERAL REVENUE (1)	900.7	1,038.4	1,045.8	1,044.5	1,045.8	1,044.5
State Operations	900.7	1,038.4	1,045.8	1,044.5	1,045.8	1,044.5
PROGRAM REVENUE (2)	4,399.5	6,277.1	5,647.4	5,613.0	5,547.2	5,583.0
State Operations	4,399.5	6,277.1	5,647.4	5,613.0	5,547.2	5,583.0
SEGREGATED REVENUE (3)	487.6	519.9	525.7	525.7	525.7	525.7
State Operations	487.6	519.9	525.7	525.7	525.7	525.7
TOTALS-ANNUAL	17,437.3	20,002.4	19,520.3	19,589.8	18,946.3	18,837.3
State Operations	17,437.3	20,002.4	19,520.3	19,589.8	18,946.3	18,837.3

- (1) Includes Program Revenue-Federal and Segregated Revenue-Federal
- (2) Includes Program Revenue-Service and Program Revenue-Other
- (3) Includes Segregated Revenue-Service, Segregated Revenue-Other and Segregated Revenue-Local

**Table 2
Department Position Summary by Funding Source (in FTE positions) (4)**

	ADJUSTED BASE FY01	AGENCY REQUEST FY02 FY03		GOVERNOR'S RECOMMENDATION FY02 FY03	
GENERAL PURPOSE REVENUE	139.50	139.50	139.50	139.50	139.50
FEDERAL REVENUE (1)	5.85	6.60	6.10	6.60	6.10
PROGRAM REVENUE (2)	32.80	25.22	22.72	25.22	22.72
SEGREGATED REVENUE (3)	3.25	3.75	3.75	3.75	3.75
TOTALS-ANNUAL	181.40	175.07	172.07	175.07	172.07

- (1) Includes Program Revenue-Federal and Segregated Revenue-Federal
- (2) Includes Program Revenue-Service and Program Revenue-Other
- (3) Includes Segregated Revenue-Service, Segregated Revenue-Other and Segregated Revenue-Local
- (4) All positions are State Operations unless otherwise specified

**Table 3
Department Budget Summary by Program (in thousands of dollars)**

	ACTUAL FY00	ADJUSTED BASE FY01	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY02	FY03	FY02	FY03
1. History services	\$4,677.5	\$5,208.1	\$19,580.7	\$19,650.2	\$18,946.3	\$18,837.3
2. Historic sites	5,524.1	6,467.5	9.6	9.6		
3. Historic and burial sites preservation	1,885.3	1,984.8				
4. Executive and administrative services	2,685.9	3,148.4	-70.0	-70.0		
5. Museum	2,664.5	3,193.6				
TOTALS	17,437.3	20,002.4	19,520.3	19,589.8	18,946.3	18,837.3

**Table 4
Department Position Summary by Program (in FTE positions) (4)**

	ADJUSTED BASE FY01	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY02	FY03	FY02	FY03
1. History services	67.40	174.57	171.57	175.07	172.07
2. Historic sites	33.50	0.50	0.50		
3. Historic and burial sites preservation	22.00				
4. Executive and administrative services	33.50				
5. Museum	25.00				
TOTALS	181.40	175.07	172.07	175.07	172.07

(4) All positions are State Operations unless otherwise specified

1. Historical Society Appropriation Consolidation

The Governor recommends consolidating the State Historical Society's appropriation structure to give the society greater flexibility to provide history services in Wisconsin. Under the recommended structure, the society will have appropriations for the following purposes: (a) general program operations; (b) historic sites and museum services; (c) energy costs; (d) principal repayment, interest and rebates; (e) admissions, sales, and other receipts; (f) gifts and grants; (g) self-amortizing facilities principal repayment, interest and rebates; (h) Northern Great Lakes Center; (i) interagency and intraagency projects; (j) federal funds; (k) indirect cost reimbursements; (l) endowments; and (m) Northern Great Lakes Center interpretive programming.

2. Transfer Position

The Governor recommends transferring \$26,000 GPR and 0.75 FTE GPR from the administrative services appropriation to the archives appropriation to better reflect the position's responsibilities.

3. PR-O, PR-F, SEG Adjustments

Source of Funds	Agency Request				Governor's Recommendation			
	FY02		FY03		FY02		FY03	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
PR-O	-462,600	0.00	-462,600	0.00	-462,600	0.00	-462,600	0.00
TOTAL	-462,600	0.00	-462,600	0.00	-462,600	0.00	-462,600	0.00

The Governor recommends adjustments in the agency's base budget to reflect a reestimate of program revenues.

4. Fuel and Utility Reestimate

Source of Funds	Agency Request				Governor's Recommendation			
	FY02		FY03		FY02		FY03	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	62,500	0.00	49,700	0.00
TOTAL	0	0.00	0	0.00	62,500	0.00	49,700	0.00

The Governor recommends increased funding to adjust the fuel and utilities budget for expected changes in prices and for statistically normal weather conditions.

5. Debt Service Reestimate

Source of Funds	Agency Request				Governor's Recommendation			
	FY02		FY03		FY02		FY03	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-6,700	0.00	-137,400	0.00
PR-O	0	0.00	0	0.00	-100,200	0.00	-30,000	0.00
TOTAL	0	0.00	0	0.00	-106,900	0.00	-167,400	0.00

The Governor recommends adjustments in the agency's base to reflect a reestimate of debt service on authorized bonds.

6. Budget Efficiency Measures

Source of Funds	Agency Request				Governor's Recommendation			
	FY02		FY03		FY02		FY03	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-525,800	0.00	-525,800	0.00
TOTAL	0	0.00	0	0.00	-525,800	0.00	-525,800	0.00

The Governor recommends reducing the agency's largest GPR state operations appropriation in the amounts shown to create additional operational efficiencies. If within 90 days of the publication of the budget bill the agency submits a plan to the Department of Administration and the Joint Committee on Finance to reallocate some or all of the reductions to other sum certain state operations appropriations within the agency, the Secretary of the Department of Administration will forward any approved reallocation plans to the Joint Committee on Finance for its review and approval.

7. Standard Budget Adjustments

Source of Funds	Agency Request				Governor's Recommendation			
	FY02		FY03		FY02		FY03	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	134,400	0.00	134,400	0.00	130,600	0.00	130,600	0.00
PR-F	7,400	0.75	6,100	0.25	7,400	0.75	6,100	0.25
PR-O	-179,100	-6.83	-213,500	-9.33	-179,100	-6.83	-213,500	-9.33
PR-S	12,000	-0.75	12,000	-0.75	12,000	-0.75	12,000	-0.75
SEG-O	5,800	0.50	5,800	0.50	5,800	0.50	5,800	0.50
TOTAL	-19,500	-6.33	-55,200	-9.33	-23,300	-6.33	-59,000	-9.33

The Governor recommends adjustments to the agency's base budget for: (a) removal of noncontinuing elements from the base (-\$130,400 and -1.25 FTE in FY02 and -\$166,100 and -4.25 FTE in FY03); (b) full funding of continuing position salaries and fringe benefits (\$28,000 and -5.08 FTE positions in each year); (c) reclassifications (\$33,300 GPR in each year); (d) overtime (\$4,200 GPR in each year); (e) night and weekend differential pay (\$10,200 GPR in each year); (f) fifth week of vacation as cash (\$30,400 in each year); and (g) full funding of lease and directed move costs (\$1,000 GPR in each year).

ITEMS NOT APPROVED

The following requests are not included in the Governor's budget recommendations for the Historical Society.

Decision Item	Source of Funds	FY02		FY03	
		Dollars	Positions	Dollars	Positions
8. Excellence in History Education in Wisconsin Schools	GPR	0	0.00	105,200	0.00
9. Executive Assistant	GPR	0	0.00	0	0.00
TOTAL OF ITEMS NOT APPROVED	GPR	0	0.00	105,200	0.00